MMA

How Marketers Can Use Location Data to Plan for the New "Normal"

Today's Speakers

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PLACEIQ

MMA is the Global Industry Association for Marketing

Started in 2003; turned around in 2013

Operations in 15 countries

Marketer led; plus media sellers, tech and agencies

55+ team worldwide

25+ conferences in 15 countries

EMEA

- France
- Germany
- Middle East
- South Africa
- Spain
- Turkey
- United Kingdom

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LATAM

- Mexico
- Brazil
- Colombia
- Argentina

APAC

- China
- Vietnam
- India

Who & What is the MMA All About

WHO
The People We Serve

Primary Audience

Pioneering Chief Marketers

Bank of America · McDonald's · Walmart · Subway · dunkin' brands · Mastercard · JPMorganChase · CVS Health · GM · Marriott · AT&T · Hilton · Unilever · Target · pepsi

WHAT
Our Strategic Priorities

Measurement & Business Impact

Drive marketing effectiveness and the future of measurement for sustainable business growth

Marketer Org Development

Redefine marketing organization dynamics and future capabilities needed in a data

Inspiration

Lead marketing innovation and creative effectiveness/impact for mobile and emerging technologies

Advocacy

Establish standards and self-regulatory guidelines to improve consumer trust and confidence in marketing and connected devices

WHY
Our Reason for Being

Purpose

To enable marketers to drive innovation and enduring business value in an increasingly dynamic and connected-connected world.

MMA

MMA IS 800+ MEMBERS STRONG GLOBALLY

MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS

MMA Programs Transform Marketers Understanding of Marketing

The following are the core programs of the MMA

MMA Key Programs	Description
Key Think Tanks	
① **Marketer Organization Think Tank (MOSTT)**	▪ Community of CMO & academics rethinking the modern marketing org; focused on measuring marketing org to financial performance. Soon to be featured in HBR
② **Marketing Attribution Think Tank (MATT)**	▪ Community of marketing & analytics leaders committed to measurable impact & accountability by advancing people-based approaches in media measurement.
③ **Data in Marketing Think Tank (DATT)**	▪ Focused on supporting marketers in their ingesting, applying and success with data in marketing. Eventually, group is to be regulatory voice of CMOs on Data. In development
Funded Research	
④ **Brand as Performance (BaP) ***	▪ Industry consortium to first time ever measure the impact of Brand, a core element of marketing success. Will likely to produce a new growth framework for brands. ($850k)
⑤ **First-Second Strategy (Cognition 2 study)**	▪ Groundbreaking new Cognition Neuroscience Research project set out to understand how consumers process information. Cog 2 will look at time's effect on impact.
⑥ **SMOX (Modern Marketing Mix)**	▪ Series of 14 studies that examine mobile's role in a multi-channel (TV to mobile) world, with empirical evidence on dynamics of the modern marketing mix.
⑦ **Location Privacy Alliance (LPA) ***	▪ Focused on development of a Hippocratic Oath for the application of location data to marketing. Second phase is developing regulatory education materials
Key Member Councils	
⑧ **Mobile Fraud Tool & Council ***	▪ Member council created better help our members stay ahead of Mobile marketing fraud by assessing, evaluating, and combatting Fraud. Fraud assessment tool coming.
⑨ **Brand Safety Council (SAVE)**	▪ Marketer-led council created to ensure safeguards for brands in all marketing environments, to protect the brand's reputation and marketing investment.
⑩ **RCS/SMS/OTT Messaging**	▪ Member Committee focused on the roll-out of RCS across the US, and preparing an "RCS Center of Excellence" that issues regular guidance on this new function.
⑪ **MMA Events**	▪ 35+ event across 16 countries globally, from 350 to 2,000 attendees.
⑫ **MMA Smarties**	▪ Awards Program that offers marketers multiple opportunities to showcase their best work in modern marketing around the world. Includes a business impact index

* Obligations to sponsors

MMA COVID-19 Marketer Support Hub
#WeAreInItTogether

The most comprehensive central resource for information on the coronavirus pandemic as well as guidance for brands on how to navigate marketing during the worldwide crisis. Information is constantly being curated and loaded in real time, the hub is searchable by the different regions the MMA serves (North America, APAC, EMEA and LATAM) and includes:

1 — An aggregation of critical information on Covid-19's impact around the world

2 — Tools and tips for managing teams remotely, crisis guidance as well as programs to support small businesses

3 — Marketing and advertising best practices and current consumer trends to help brand members make more informed decisions

4 — Some light moments with staff picks on the humorous videos and memes circulating

We'd love to include your content.
If you are an MMA Member with Resources / Programs / Research that is focused on helping brand marketers, we'd love to include your information in the hub,

Please visit https://www.mmaglobal.com/marketersupporthub/weareinittogether

Asking Questions, Sharing Insights

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Talking:

Questions

Type question here.

Send

Tentative: Mobile & Privacy: Actionable Steps
for Success
Webinar ID# 249-340-790

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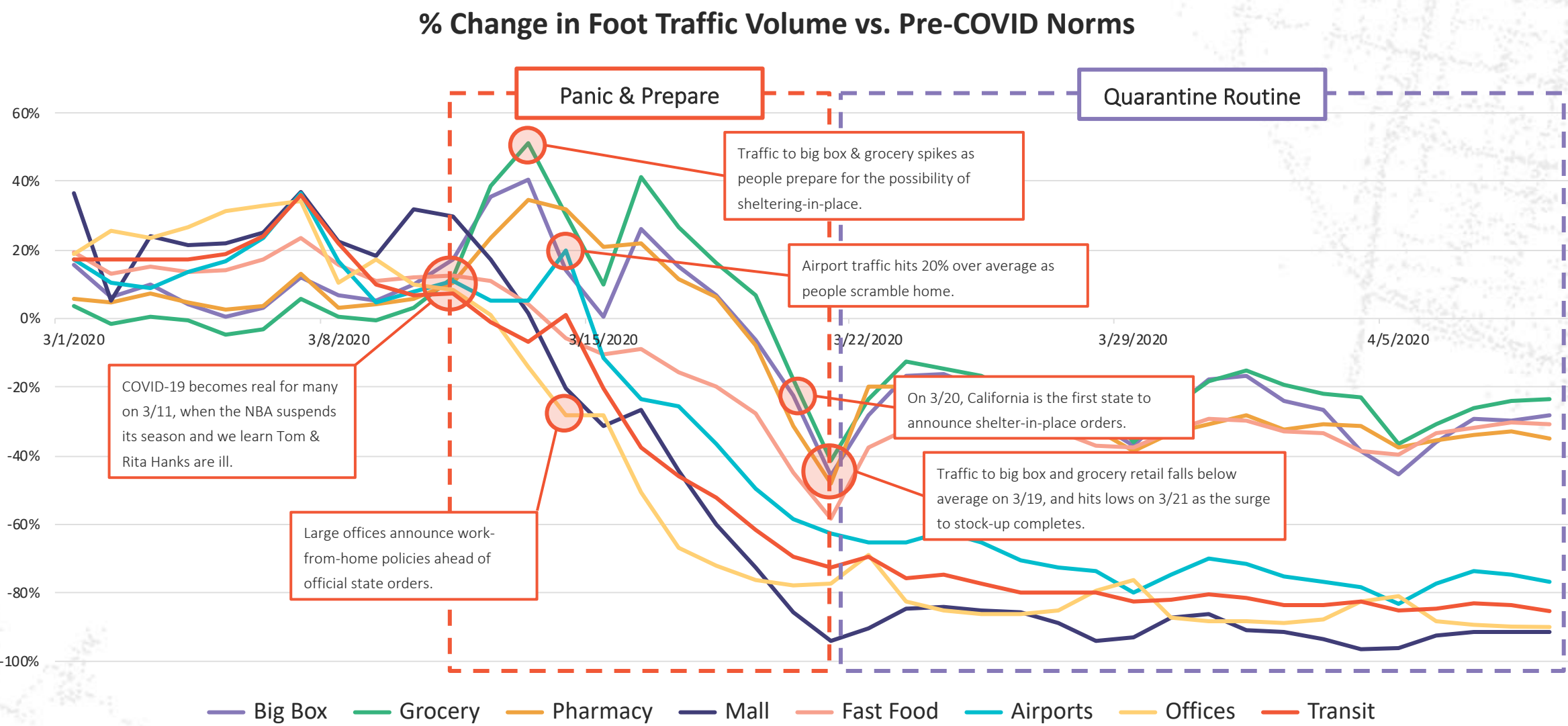
#MMA
#WeAreInItTogether
#ShapeTheFuture

How Marketers Can Use Location Data to Plan for the New "Normal"

June 18, 2020

Social Distance Tracker Insights

HOW HAS CONSUMER BEHAVIOR CHANGED DURING COVID-19?

# WE SHELTERED IN PLACE AS A NATION, FOLLOWING CULTURAL CUES

% Change in Foot Traffic Volume vs. Pre-COVID Norms

Panic & Prepare

Quarantine Routine

Traffic to big box & grocery spikes as people prepare for the possibility of sheltering-in-place.

Airport traffic hits 20% over average as people scramble home.

COVID-19 becomes real for many on 3/11, when the NBA suspends its season and we learn Tom & Rita Hanks are ill.

Large offices announce work-from-home policies ahead of official state orders.

On 3/20, California is the first state to announce shelter-in-place orders.

Traffic to big box and grocery retail falls below average on 3/19, and hits lows on 3/21 as the surge to stock-up completes.

Legend: Big Box — Grocery — Pharmacy — Mall — Fast Food — Airports — Offices — Transit

VERTICALS AND SUBCATEGORIES VARIED IN DECLINE

Category	Decline in Foot Traffic
Grocery	- 27%
Big Box	- 34%
Fast Food	- 34%
Pharmacy	- 34%
Auto Dealerships	- 43%
Coffee Shops	- 52%
Fast Casual Dining	- 58%
Nature & Outdoors	- 60%
Airports	- 77%
Casual Dining	- 77%

April 15, 2020
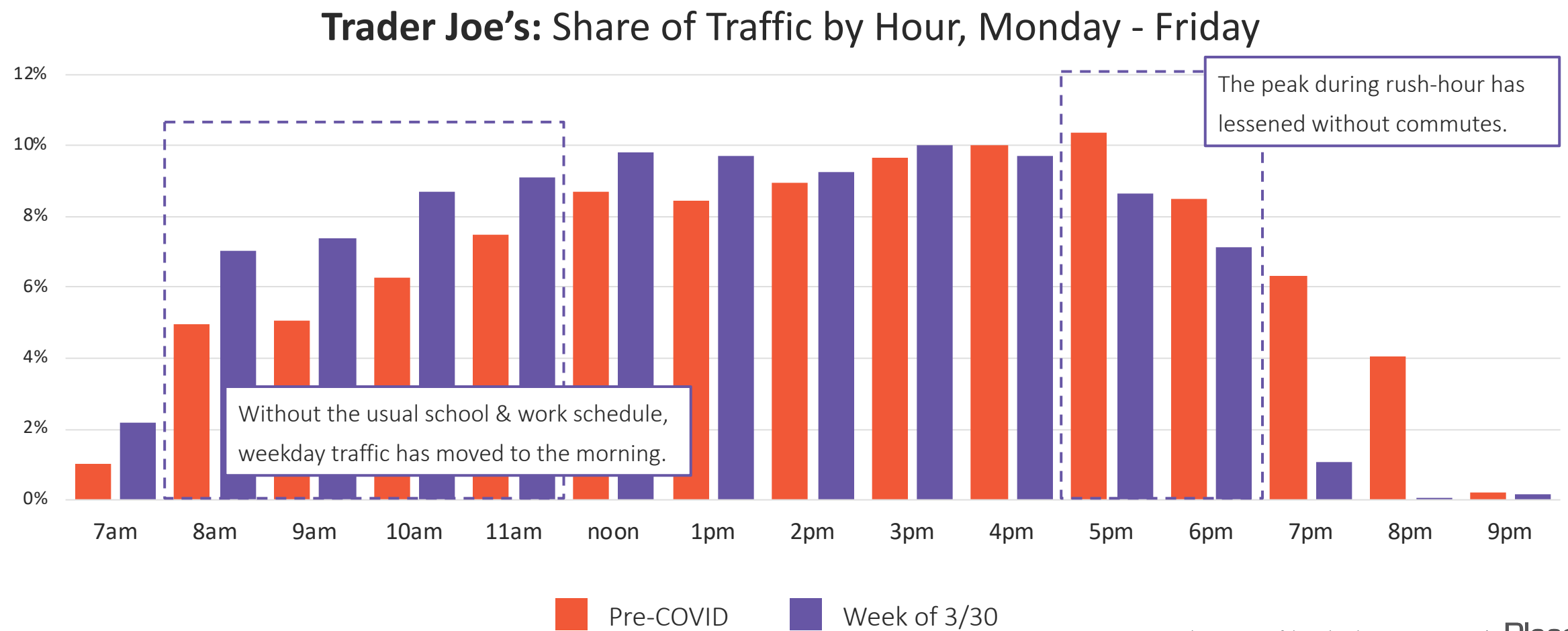
OUR WEEKLY ROUTINE BECAME FLAT

The Pre-COVID Weekday Foot Traffic Routine
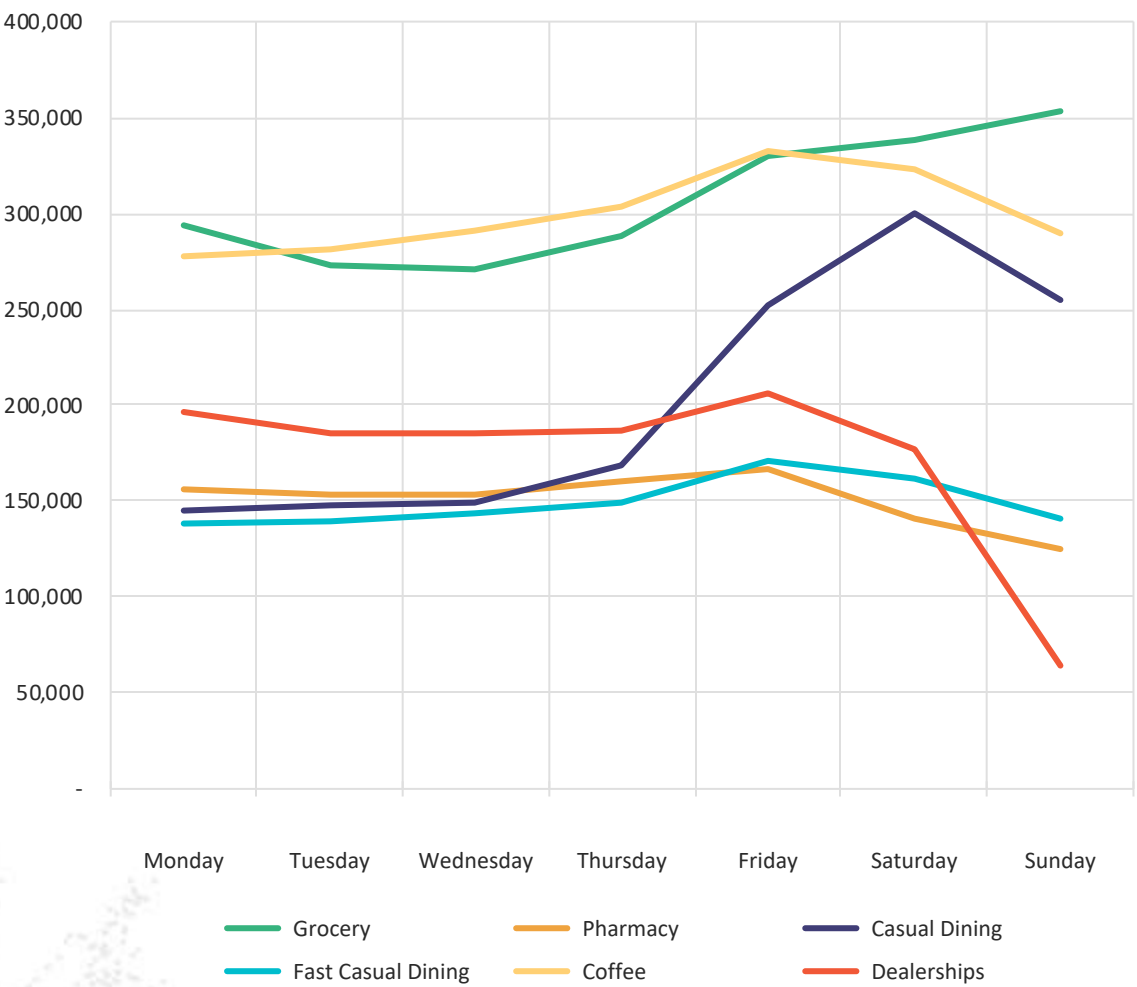
The Shelter-in-Place Foot Traffic Routine

Grocery has flattened significantly, without the constraint of commutes and school.

Casual Dining is struggling to remain relevant in a pick-up context.

Legend (both charts): Grocery, Pharmacy, Casual Dining, Fast Casual Dining, Coffee, Dealerships
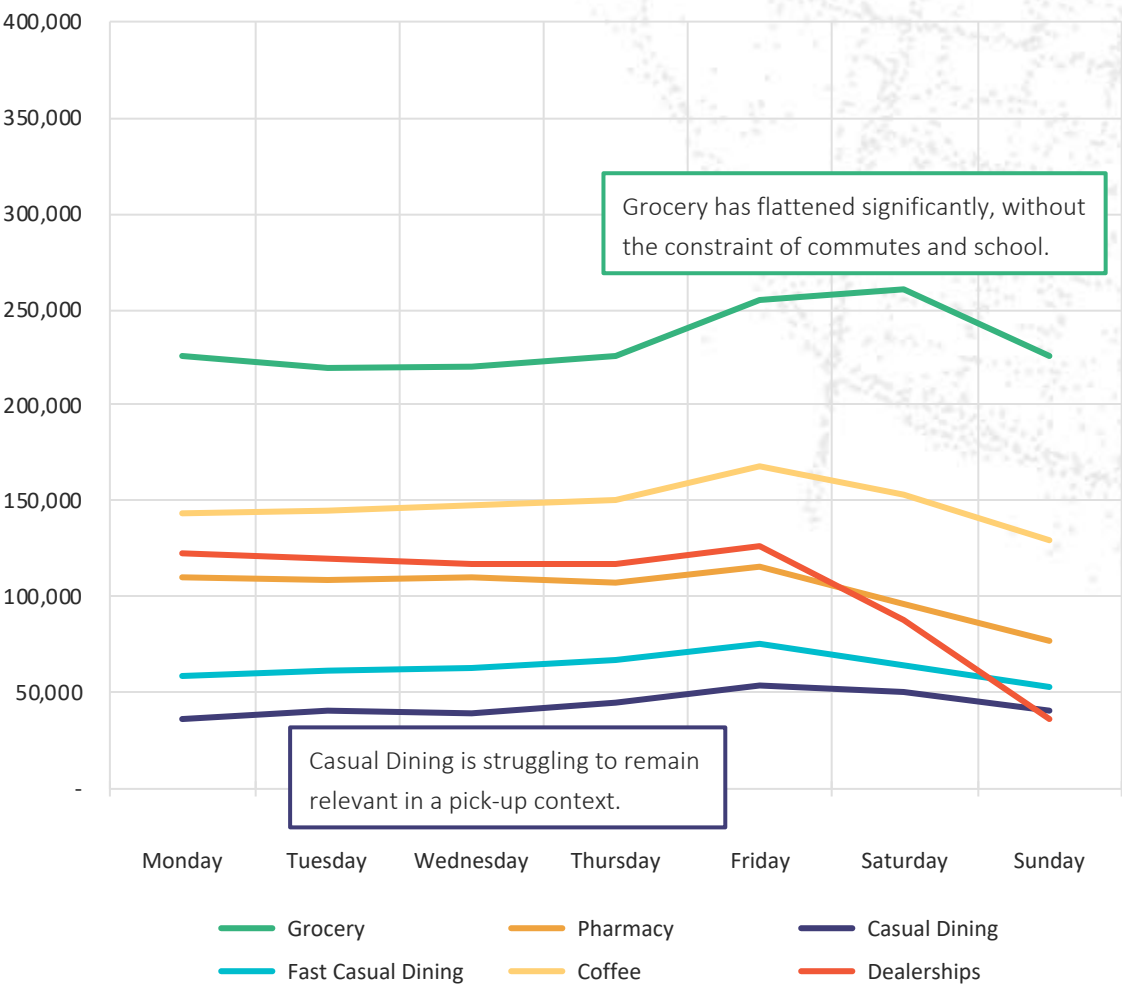
PEOPLE DROVE LESS, STAYING MOSTLY WITHIN 3 MI FROM HOME

Change in Median Distance Traveled (km) by Category

February Avg Week of 3/30

Category	Value
Auto Dealerships	-6%
Casual Restaurants	-26%
Coffee Shops	-16%
Fast Casual Restaurants	-13%
Fast Food Restaurants	-8%
Big Box Stores	-6%
Grocery Stores	-5%
Pharmacies	-10%

Dining feels the pain the most, as workers no longer commute to offices and visit businesses nearby.
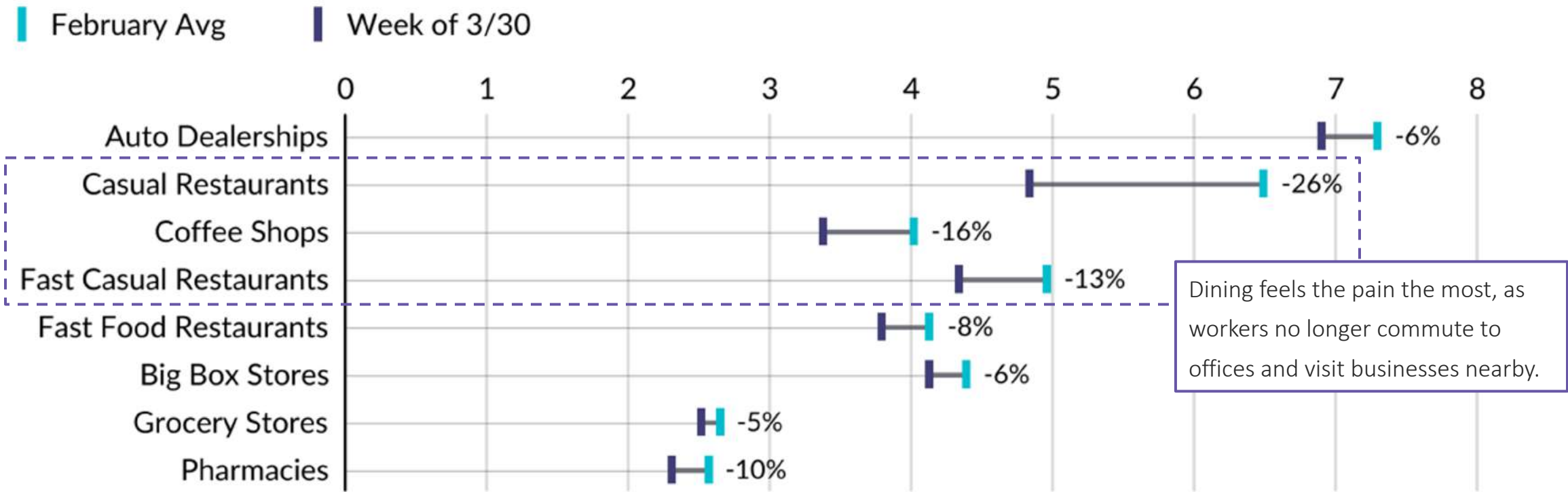
Produced by PlaceIQ, 4/7/2020

The Next Phase of Social Distancing

FOOT TRAFFIC IS RETURNING, BUT IT VARIES BY CATEGORY

REEMERGENCE CONTINUES: BUT VELOCITY OF GROWTH VARIES

Foot Traffic vs. Pre-COVID Norms, by Category

Legend: Big Box, Grocery, Pharmacy, Mall, Casual Dining, Fast Casual, Fast Food, Coffee, Airport, Hotel, Entertainment, Nightlife, Office, Transit, Dealerships
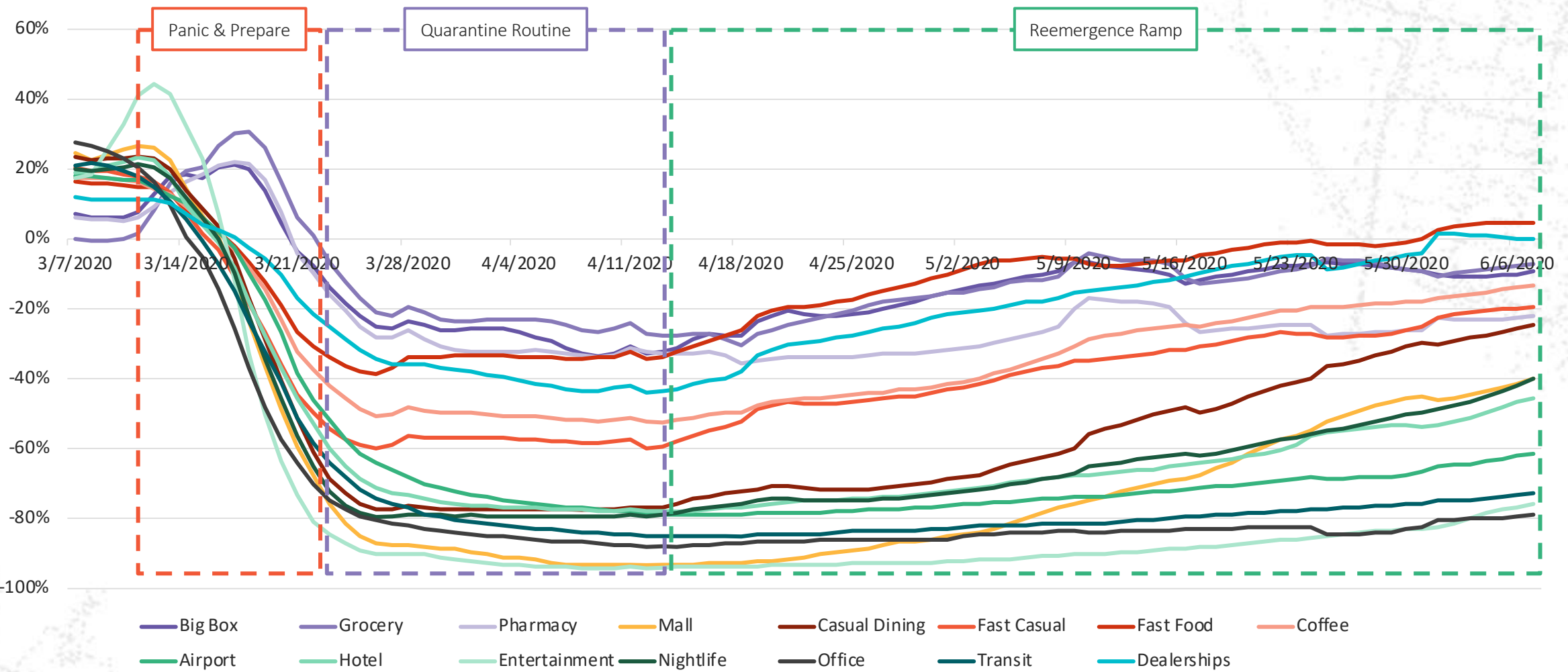
STILL EMPTY: STUCK ON THE FLOOR WITH LOW FOOT TRAFFIC VOLUMES

Foot Traffic Changes vs Pre-COVID Norms and the Reemergence Ramp

VELOCITY: Change over Reemergence Ramp

Growing Fast

Returning to Norm

Entertainment

Airports

Offices

Public Transit

RECOVERY: Change vs. Pre-COVID Norm
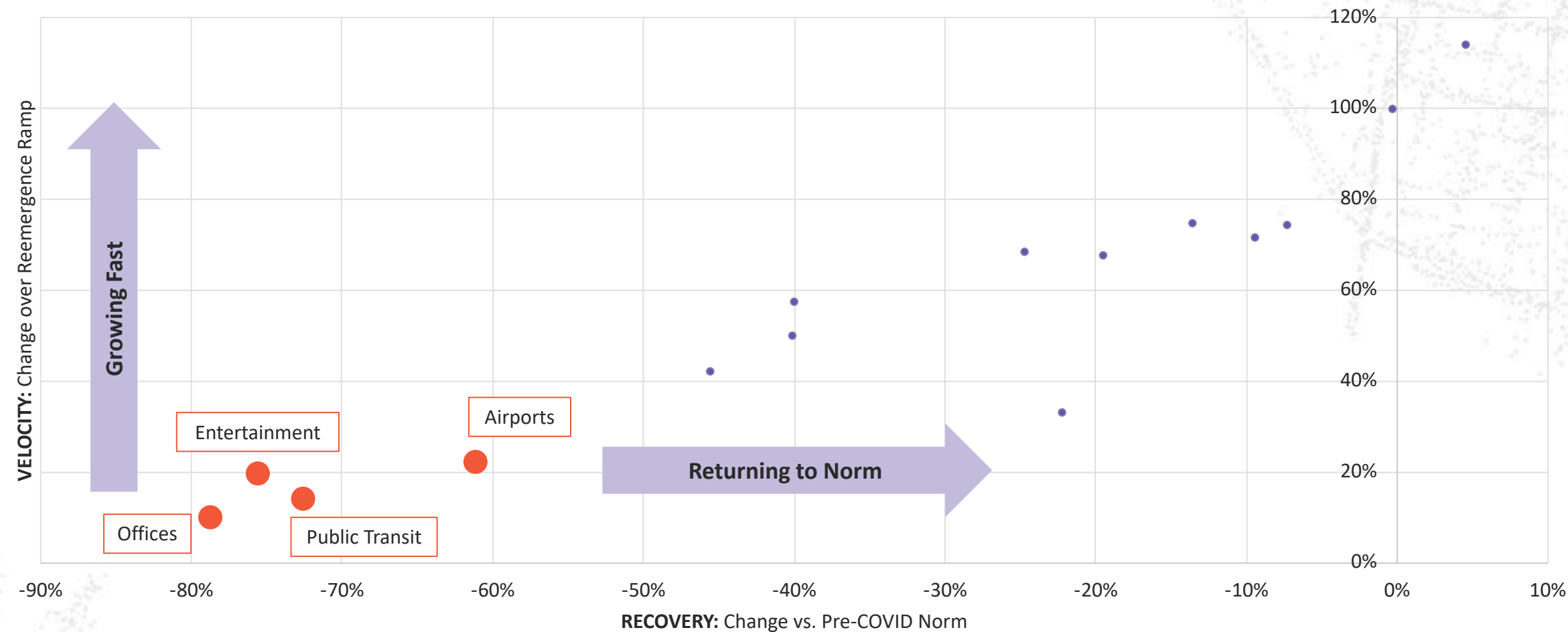
BEGINNING REEMERGENCE: PICKING THEMSELVES UP OFF THE FLOOR

Foot Traffic Changes vs Pre-COVID Norms and the Reemergence Ramp

VELOCITY: Change over Reemergence Ramp

Growing Fast

Shopping Malls

Hotels

Nightlife

Returning to Norm

RECOVERY: Change vs. Pre-COVID Norm
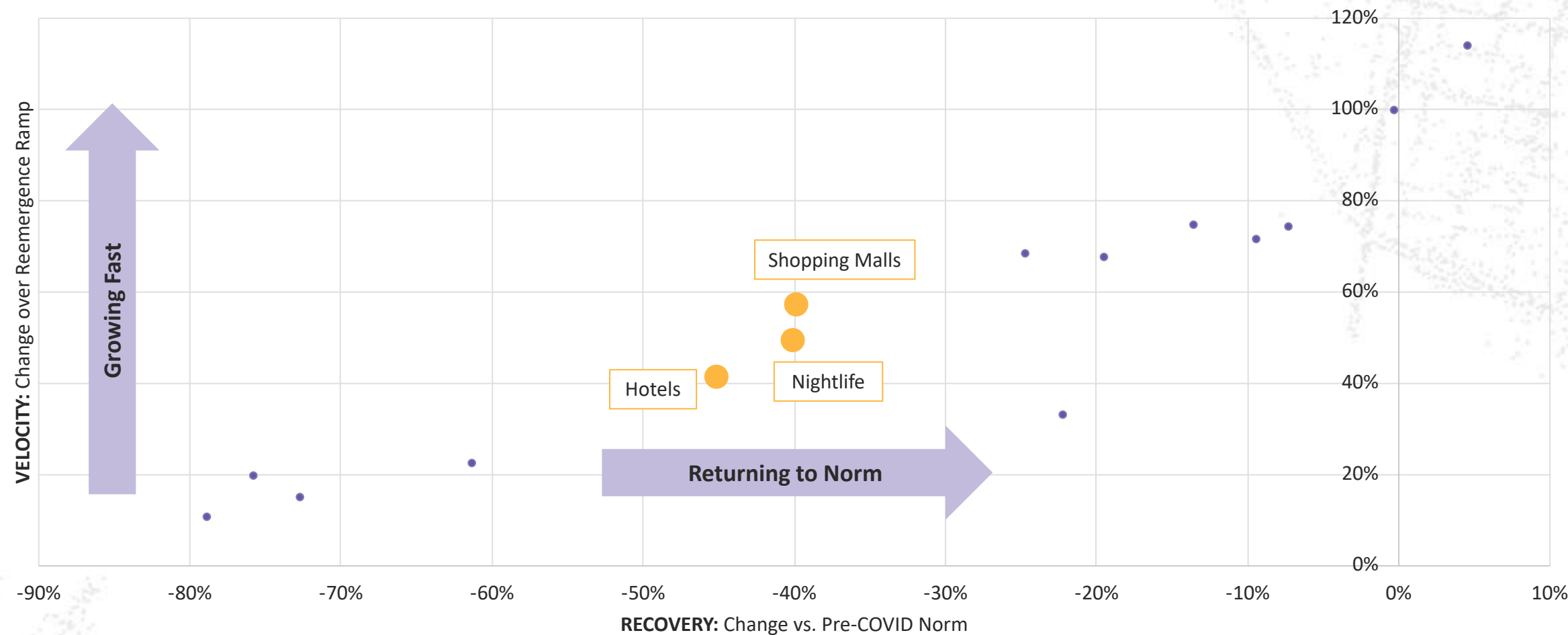
STEADILY REEMERGING: ESSENTIAL RETAILERS BUILD MOMENTUM

Foot Traffic Changes vs Pre-COVID Norms and the Reemergence Ramp

VELOCITY: Change over Reemergence Ramp

Growing Fast

Returning to Norm

Casual Dining

Coffee Shops

Grocery Stores

Fast Casual

Big Box

RECOVERY: Change vs. Pre-COVID Norm
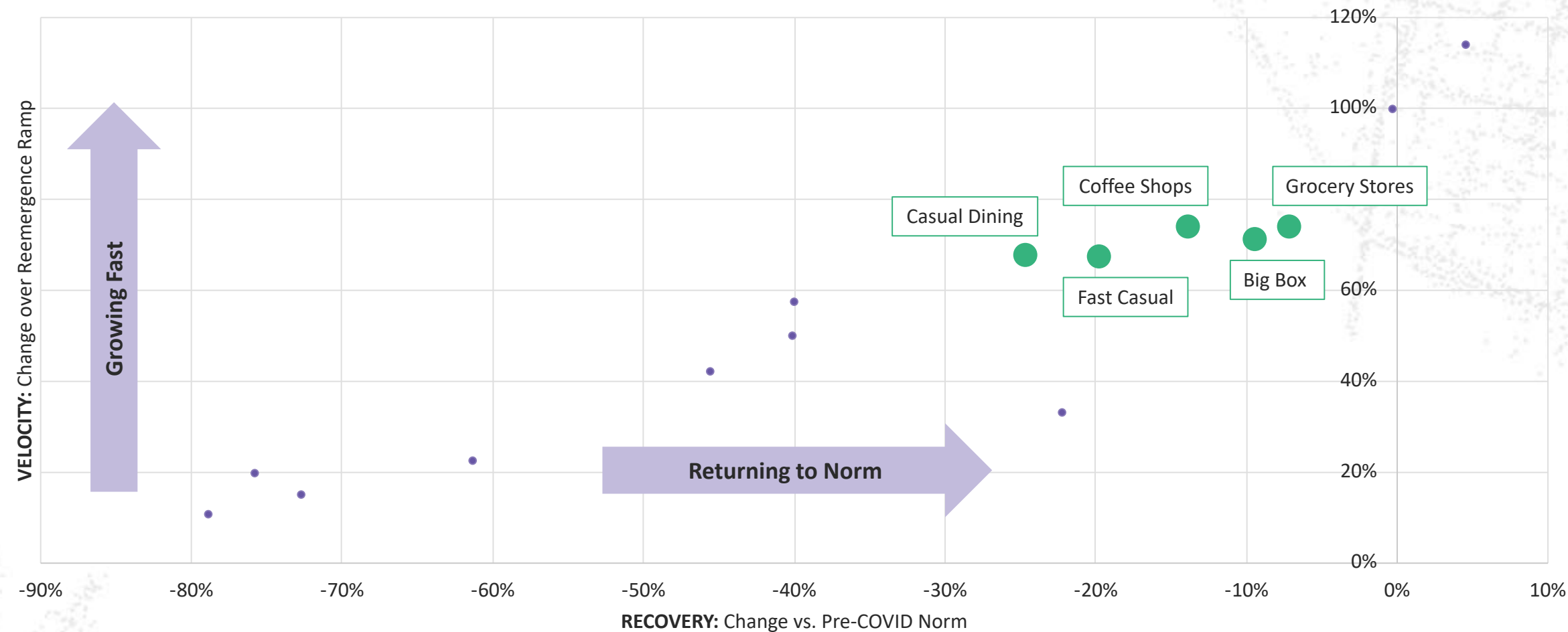
THE OUTLIERS: FAST FOOD & DEALERSHIPS CAPTURE DEMAND

Foot Traffic Changes vs Pre-COVID Norms and the Reemergence Ramp

Fast Food

Dealerships

Pharmacies

VELOCITY: Change over Reemergence Ramp

Growing Fast

Returning to Norm

RECOVERY: Change vs. Pre-COVID Norm

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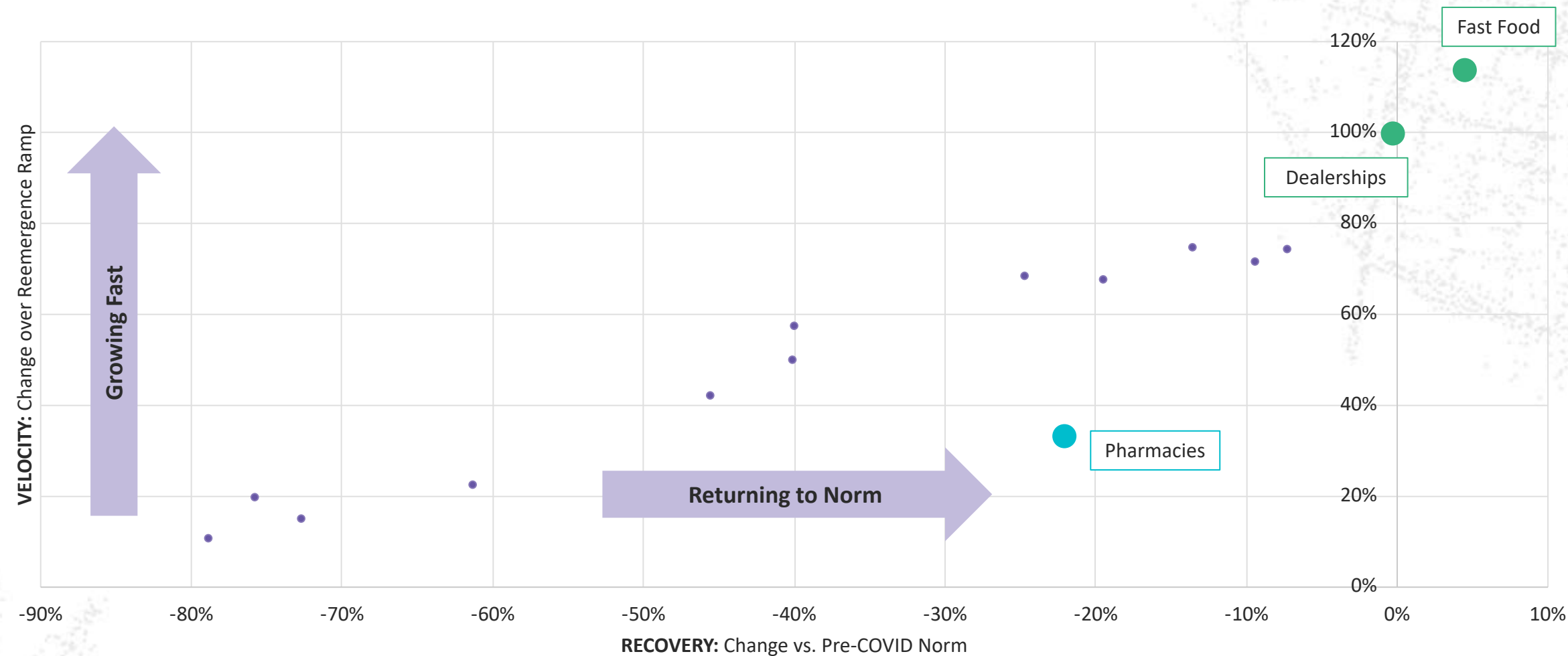
Planning for a Regional Reemergence

FOOT TRAFFIC ISN'T JUST VARIED BY CATEGORY, BUT BY HOUSEHOLD

REEMERGENCE IS INCREDIBLY VARIED FROM COUNTY TO COUNTY

Fast Food visitation lead the way in national traffic recovery. In what counties is McDonald's foot traffic reemergent?

% Change vs. Pre-COVID Norms

-100.0%   202.4%
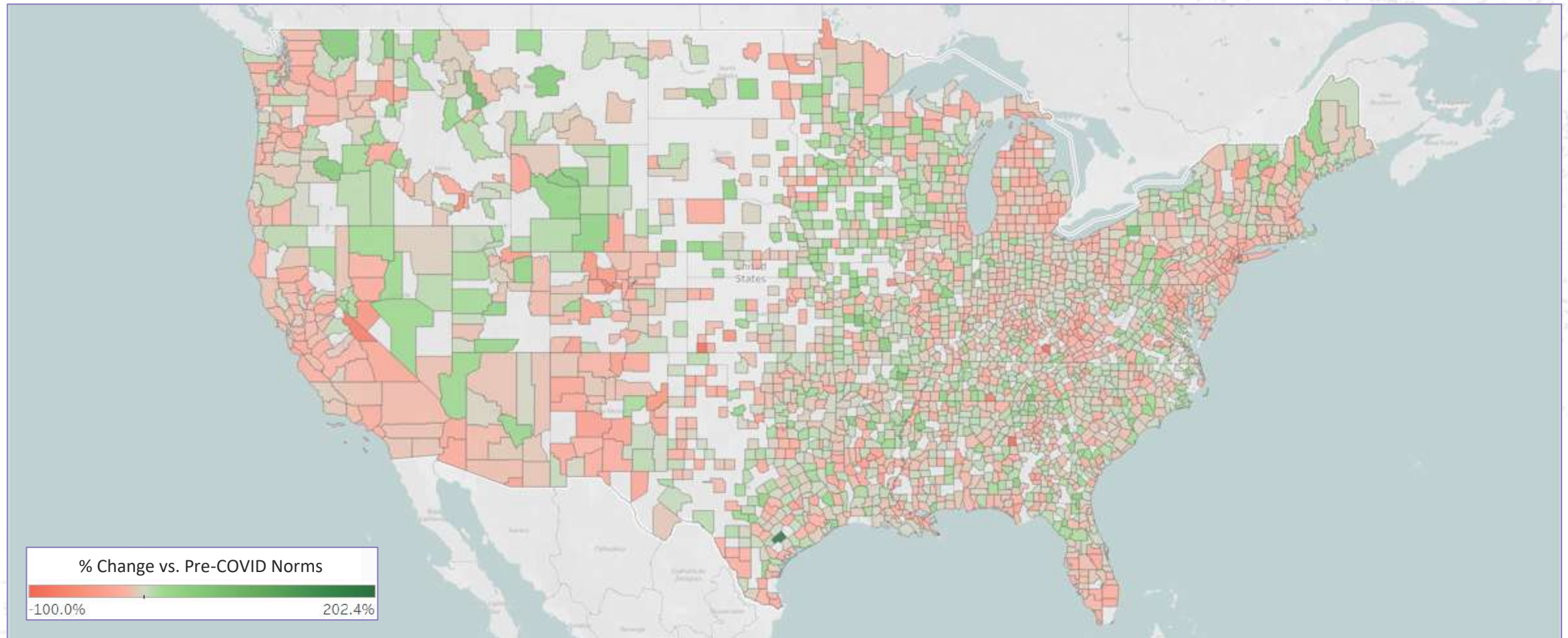
REGIONAL RETAIL RECOVERY

- Traffic to retail locations is climbing towards pre-COVID levels but is highly variable from county to county

- California, as an example, sees less retail traffic in urban areas, but even that pattern is not entirely consistent

AVG(County Reemerge...

0.7989   1.2821
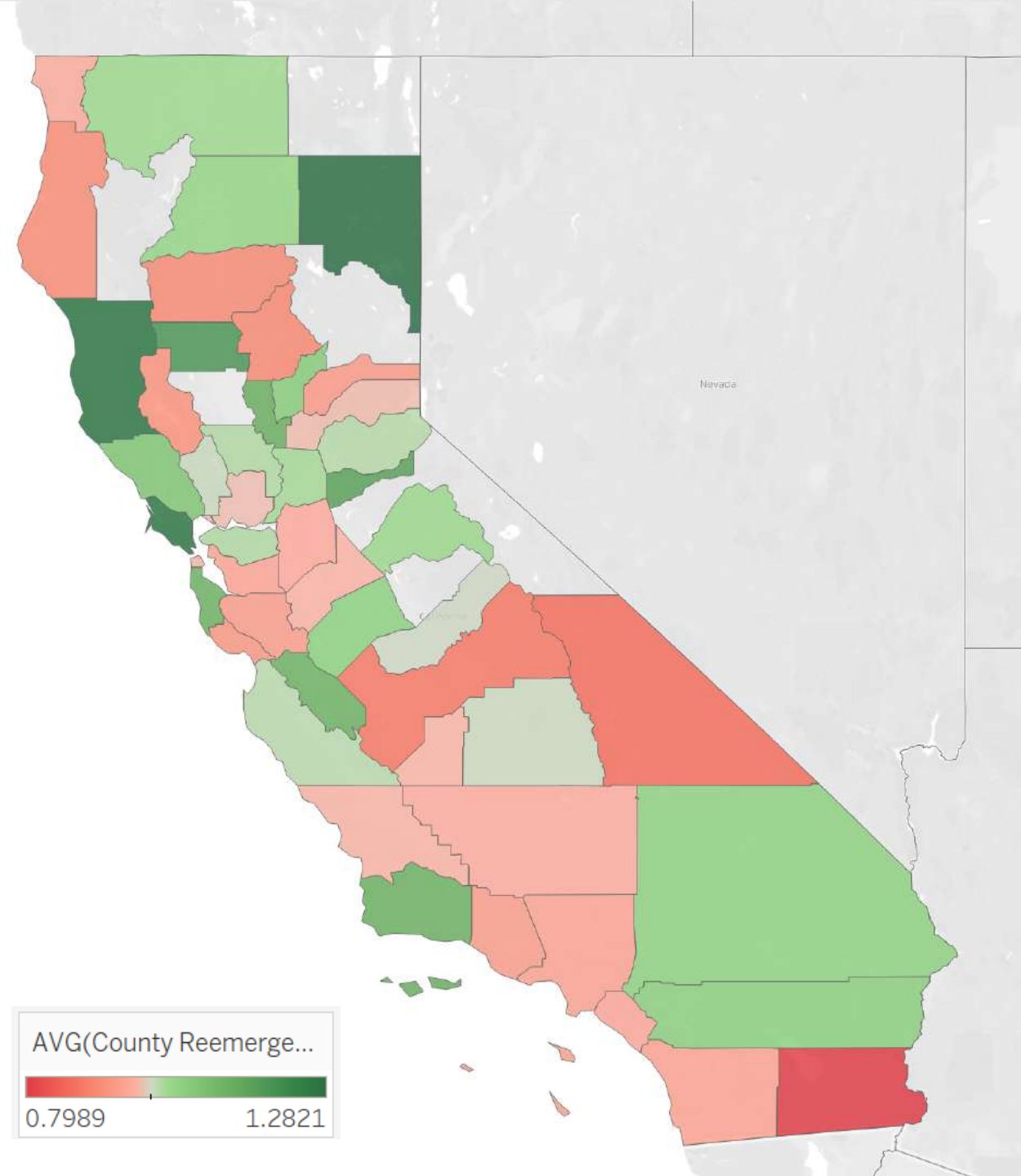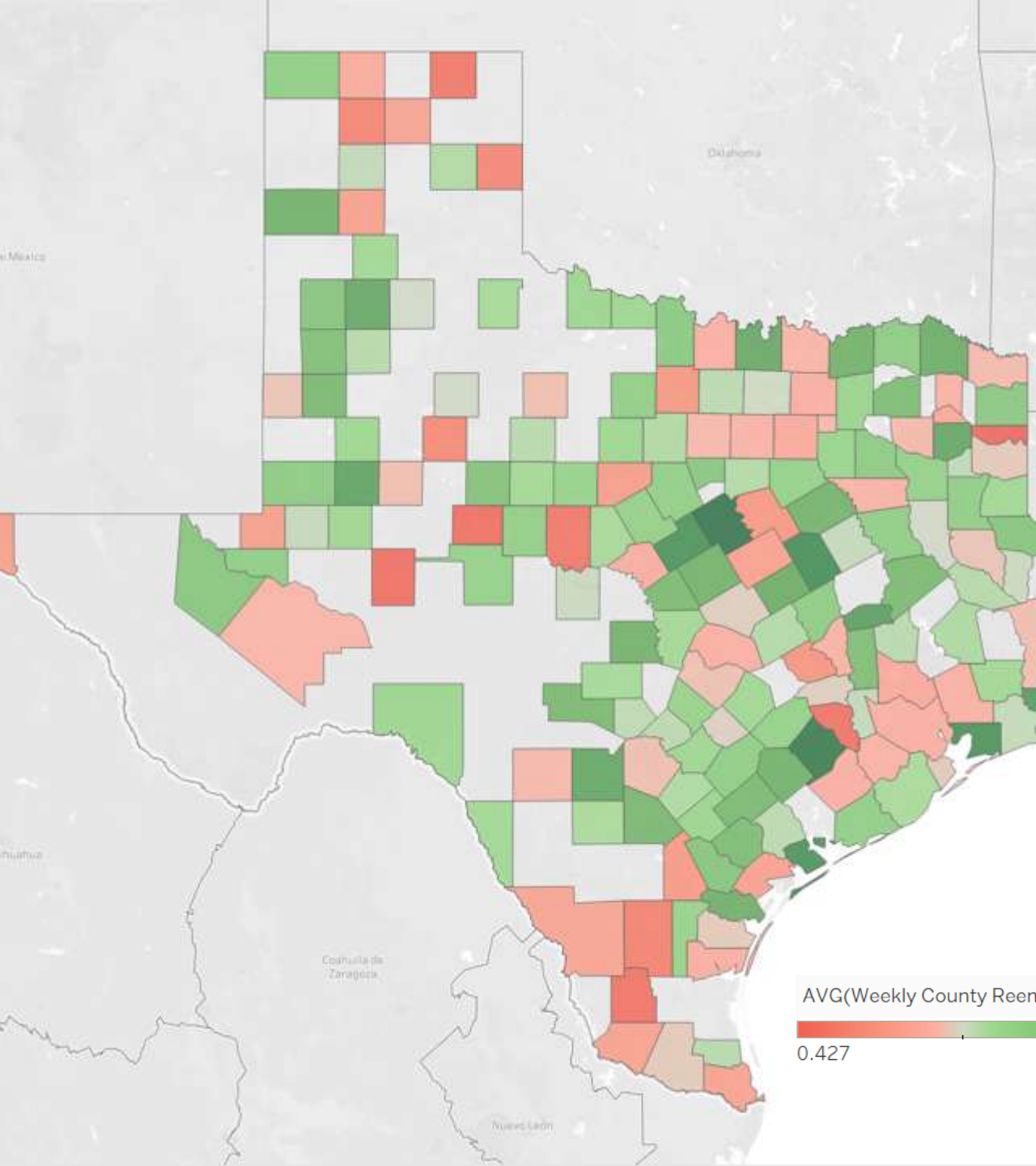
REGIONAL AUTO RECOVERY

- Traffic to auto dealerships is now nationally *above* pre-COVID levels, but is highly variable by county in Texas, where most dealerships are open.

AVG(Weekly County Reemergence Index)

0.427   2.080
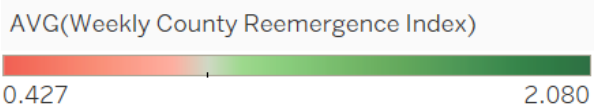
Reemergence Playbook

EFFECTIVELY MARKETING IN REGIONAL RECOVERY

CHALLENGES FACING MARKETERS

"Reopening" and "Reemergence" are Different and Don't Always Align

- Official orders, "reopening", has little impact on a community's desire to leave the house to visit businesses, "reemergence."
- Changing rules in Georgia and Texas did little to spur people back to stores.

Reemergence is Regional in Nature

- Gains in foot traffic vary widely by county and category, creating a complex environment of diverse behaviors.
- Rural communities are more likely to be out and about, but local economies, politics, infection rates, and perceived risk drive different behaviors.

"Normalcy" will need to be continuously monitored

- Regionality, shifts in official orders, new information, and the population's success in reemerging safely will continue to ebb.

IMPLEMENTING TACTICS FOR REEMERGENCE

To overcome the challenge of local complexities created by regional recovery, use tools which wrap nuanced, local data into easily used products.

Monitor

- See where reemergence is occurring – by county, category, and brand
- Track changes to individual venues with daily data

Segment

- Easily target regions and households by how much they're reemerging
- Build and discover segments in Audience Dashboards

Measure

- Evaluate impact by campaign using Place Visit Stream
- Gauge local impact by analyzing longitudinal trends with Daily Visit Count data
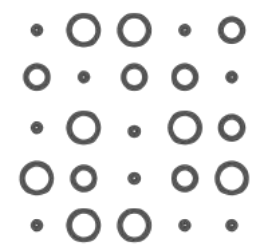
Monitor

REEMERGENCE DATASET

Track emergence and sheltering by category or brand, at the county level.

- Daily year-over-year visitation indexes

- For each US county

- At the brand or category level

- Data back to January 1st, 2020

National Example
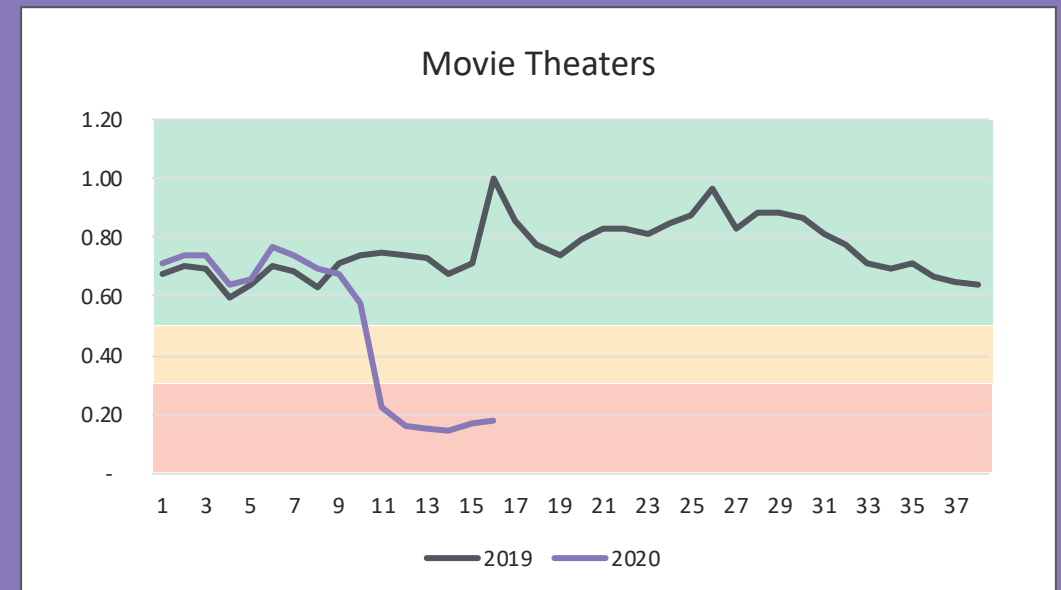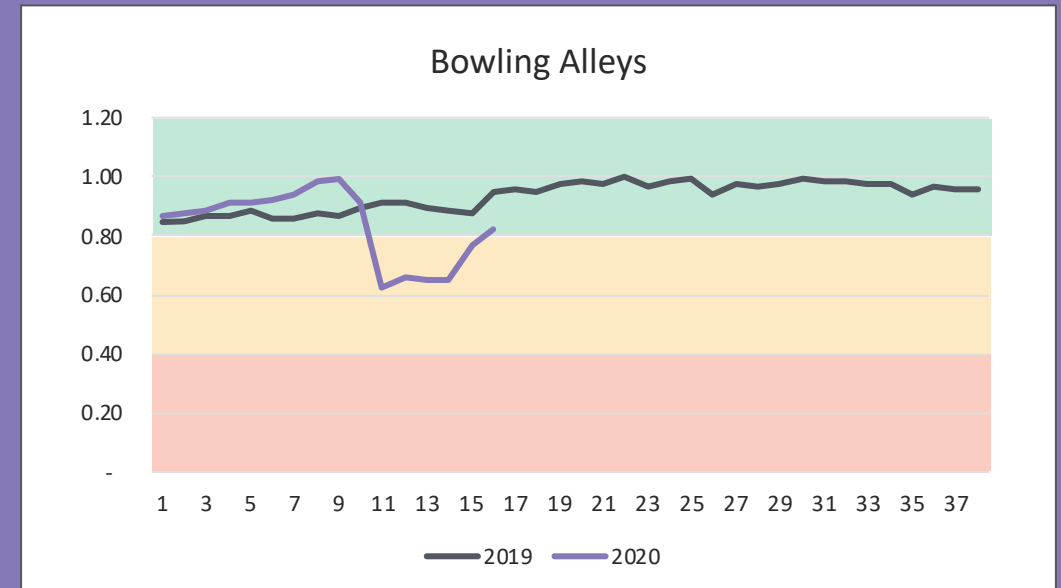
THE RIGHT MONITORING SOLUTION FOR YOUR USE CASE

PlaceIQ provides multiple data solutions to suit your specific needs and infrastructure.

Traffic Health

- Dashboard for querying traffic to brands nationally and by DMA
- Designed for dashboard access in browser

Reemergence Dataset

- Visit indices vs. 2019 at the brand/category and county level
- Designed for Excel, Tableau, and other BI tools

Daily Visit Counts

- Daily visit counts at the individual venue level
- Designed for databases and datalakes
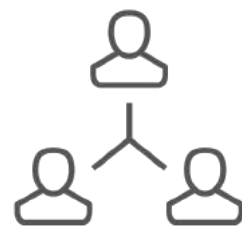
Segment

REEMERGENT AUDIENCES

Identify and target devices & households based on their observed rate of reemergence. For example, target households which are just now increasing their number of trips out of home.

Strictly Isolating

Cautiously Reemerging

Reemerged

REEMERGENT AUDIENCES USE CASES

Household Propensity to Reemerge:

Kia Example

- **Still Sheltered:** "View our online showroom"

- **Venturing Out:** "Safely get service, and a free mask at all dealerships"

- **Reemergent:** "Come visit your local dealership for a test drive"

REEMERGENT AUDIENCES USE CASES

Reemergent Regions:

McDonald's Example

- **Sheltering Regions:** "Take a break on Takeout Tuesday!"

- **Testing Regions:** "Coffee and breakfast are still on!"

- **Emergent Regions:** "Come try out our new chicken sandwich!"

# BUILD & EXPLORE WITH THE AUDIENCE DISCOVERY DASHBOARD

Measure

MEASURE WITH PLACE VISIT STREAM

Receive a stream of visit data to client-specified locations, matched to media exposures across channels. This enables you to conduct your own measurement with a platform you trust.

MARKETER'S BENEFITS

- ✓ Easy to implement across partner platforms
- ✓ High precision with scale and confidence
- ✓ Omnichannel measurement, including mobile, social, search, desktop, TV, and video through GCM
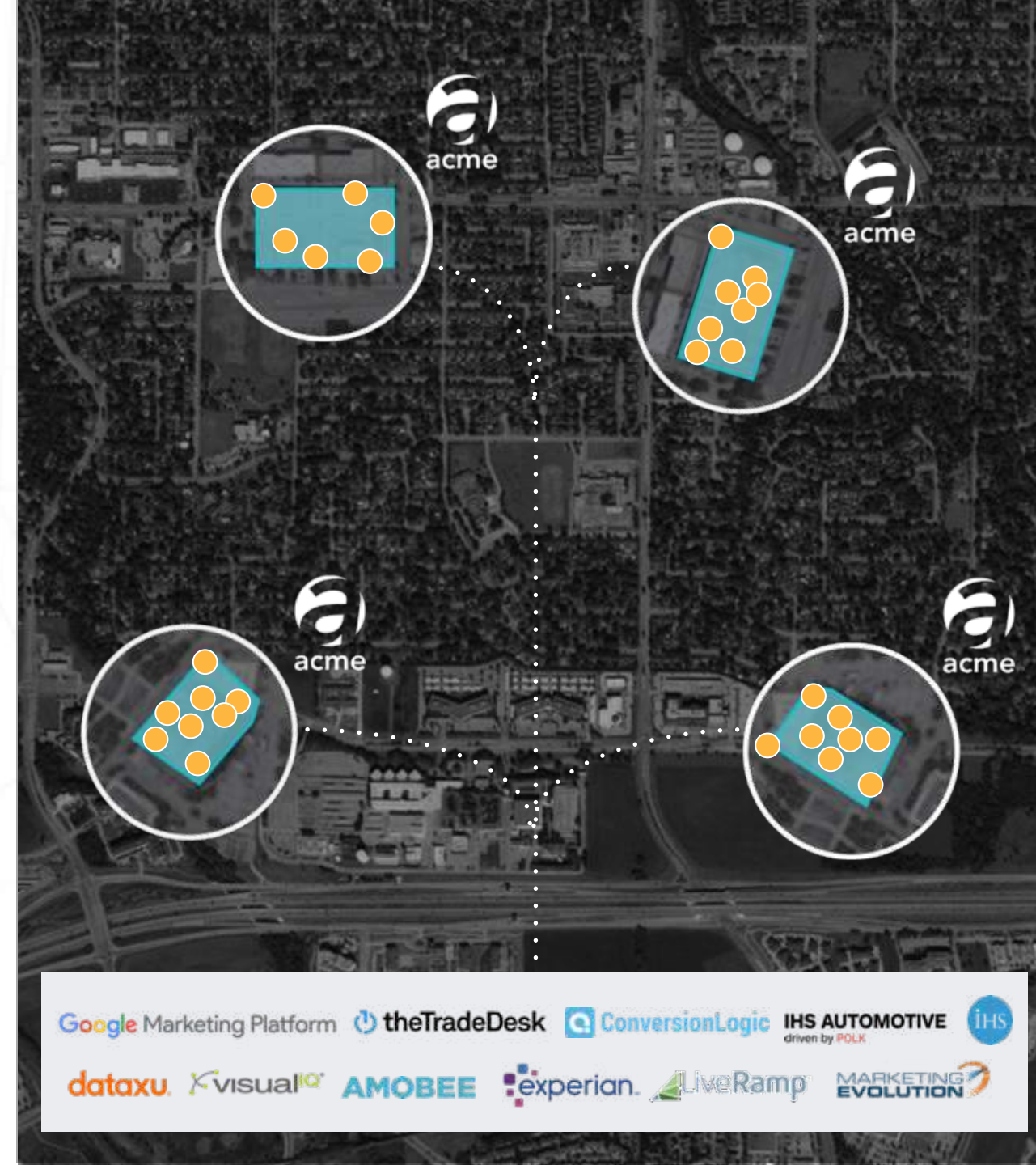
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Thank you!